



Quick Guide –
Downloading Client List
June 2022

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1.Client Profiles Overview

Client profiles created in ADX will be pushed into and stored in the Travel Edge Client Base system. Advisors who have existing profiles in Client Base will be able to access them using ADX¹. The profile will house basic client information as well as companion profiles, loyalty numbers, marketing options, travel history and all communication out of ADX.

The screenshot displays the ADX interface for a client profile. At the top, there are navigation tabs for 'Partners', 'Clients', and 'Resources'. A search bar is present with the text 'Bookings' and a dropdown menu for 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is visible in the top right.

The main profile header for 'Mr. Sam Smith' (23 March 1990, Male | 5554445555) includes a row of seven blue buttons: 'ITINERARY BUILDER', 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'.

The 'Client Information' section is divided into two columns. The left column contains a list of tabs: 'Companions', 'Additional Details and Preferences', 'Loyalty Programs', 'Marketing Fields', and 'Notes'. The right column displays the following details:

- NAME:** Mr. Sam Smith
- BIRTHDAY:** 23 March 1990
- GENDER:** Male
- PHONE:** 5554445555
- ADVISOR (PRIMARY):** Anna Kulej
- INVOICE ADDRESS:** 123 Sunny Drive, San Diego, California, United States
- BILLING ADDRESS:** Same as Invoice Address
- UPCOMING TRIP:** 19 May 2022, 3E2TPT
- LAST TRAVELED:** 10 April 2022, 51M4NW

Below this is a section titled 'QUOTES & BOOKINGS FOR MR. SAM SMITH' with tabs for 'All', 'Trips', 'Quotes', and 'Archived'. A table lists the following items:

Archive	Status	Advisor	Client	Quote Name	Depart	Services	Updated	View
<input type="checkbox"/>	QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	31.05.22		04.05.22	View
<input type="checkbox"/>	ACTION-REQ	AK	Sam Smith	Courtyard ATL Marietta I-75	11.05.22		02.05.22	View
<input type="checkbox"/>	TRAVEL-READY	AK	Sam Smith	Seattle Airport Marriott	19.05.22		02.05.22	View
<input type="checkbox"/>	PART BOOKED	AK	Sam Smith	Round Trip Flights: Los Angeles ...	12.06.22		26.04.22	View
<input type="checkbox"/>	BOOKED N/A	AK	Sam Smith	The Regent Resort Chiang Mai	18.04.22		17.01.22	View

Results: 1 - 5 of 78

At the bottom, there are sections for 'Sent Emails (5)' and 'Notifications (13)'. The 'Sent Emails' section contains a table with the following data:

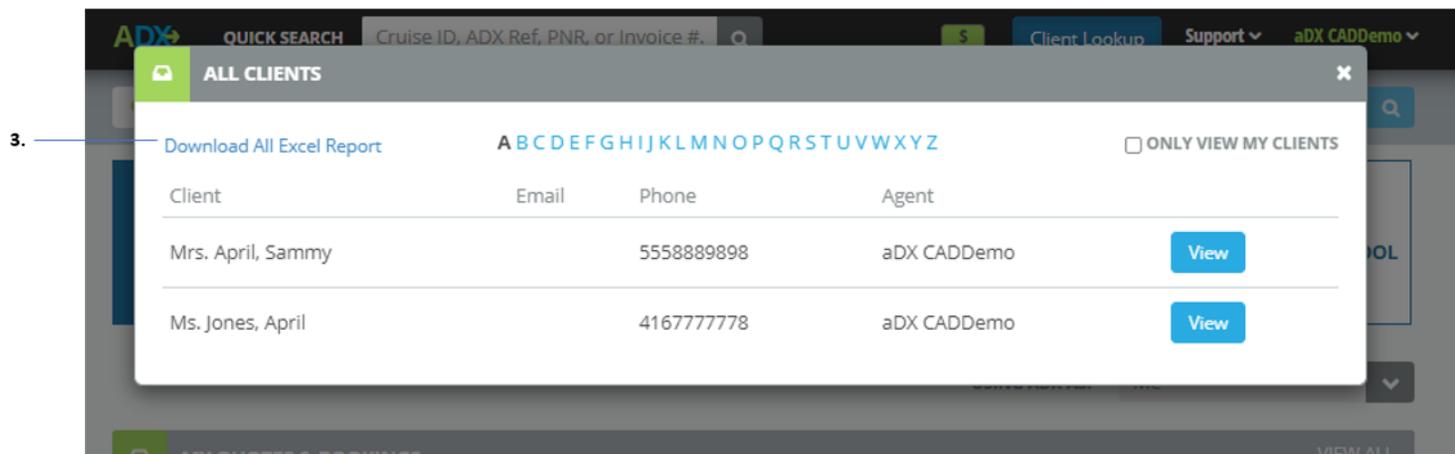
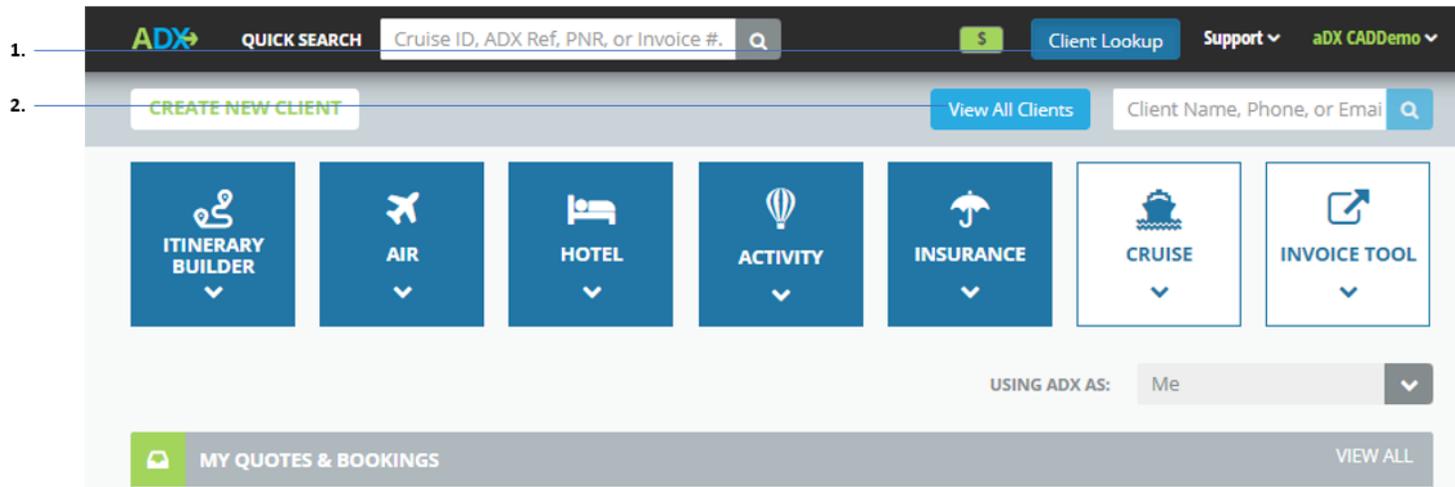
SENT DATE	EMAIL TYPE	ADX REF	EMAIL SUBJECT	EMAIL ADDRESS	View
11 Jan 2022	Quote	7X6E3	Ritz Carlton Marina Del Rey	michael.guber@traveledge.com	View
5 Jan 2022	Quote	1QJGDA	Residence Inn Downtwn Marriott - 1 nights	anisha.ramathal@triparc.com	View
7 Oct 2021	Quote	6P5Go5	One Way Flight: Los Angeles to London	smith@smith.com	View

¹ Clients ONLY pulled and stored in Travel Edge CB

1.1. DOWNLOAD CLIENT LIST

You can download a full list of your client profiles in an Excel format with the following information: First/last name, DOB, email, phone number, mailing address, passport info (number and expiry), companion info (name and DOB).

The file will be stored in your DOWNLOADS folder on your computer.



A	B	C	D	E	F	G	H
First Name	Last Name	Birth Date	Email	Phone	Mailing Address	Passport Info	Companion info
Sarah	Smith	APR 04 1970	sarah@smith.com	(416) 555-4545	123 St. , Ontario, Canada, M8M 3M3		Jackie Jones(Jun 03 1982); Sally Smith(Dec 09 2018); Sam Smith(Apr 03 1976)
Sammy	April			5558889898			
April	Jones			4167777778	66 South St. , California, United States, 90876		
Kelly	Jones	FEB 16 1982		7775555656			
Mandy	Jones	AUG 07 1992		5556665656			

	Steps		Notes
1.	Press CLIENT LOOKUP button		
2.	Press VIEW ALL CLIENTS		
3.	Press Download All Excel Report		<ul style="list-style-type: none"> • File will download as an excel file • Stored in your DOWNLOADS folder on your computer • Will ONLY show your clients